

Adding a New Staff Member for SUD Provider Network

This guidance specifies each individual step required to successfully add a SUD provider into your agencies staff module.

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Adding a New Staff Member for SUD Provider Network

Adding a Staff: Initial Requirements

1. **Getting here:** Login, click Agency and click Staff Members on the Navigation Pane (left menu).

The screenshot shows the Idaho-WITS Training interface. On the left is a navigation pane with a blue background. The 'Agency' menu item is highlighted with a red box, and a red arrow points from it to the 'Staff Members' menu item, which is also highlighted with a red box. A red circle with the number '1' is placed over the 'Staff Members' menu item. The main content area shows the 'Agency Search' section with a 'Domain' dropdown and 'Clear' and 'Go' buttons. Below this is the 'Agency List' table, which has columns for 'Actions', 'Name', 'Display Name', and 'Description'. The table contains several rows of agency information, including 'A Managed Service Contractor', 'Auth Period Testing', 'Behavioral Health Crisis Center', 'BPA Health', 'D Williams Agency', 'Department of Health & Welfare', 'DHW Child Welfare', 'DHW Contractor', 'Do not Use', 'Idaho Department of Correction', and 'Idaho Dept of Juvenile Corrections'. A red circle with the number '1' is placed over the 'BPA Health' row.

Actions	Name	Display Name	Description
	A Managed Service Contractor	A Managed Servi	
	Auth Period Testing	Auth Period Tes	
	Behavioral Health Crisis Center	BHCC	
	BPA Health	BPA Health	Agency name changed from Business Psychology Associates to BPA Health effective 10-30-15. CLH
	D Williams Agency	D Williams Agen	
	Department of Health & Welfare	State DHW	
	DHW Child Welfare	Child Welfare	
	DHW Contractor	DHW Contractor	DHW TEST CONTRACTOR agency for SUD
	Do not Use	Northern Idaho	
	Idaho Department of Correction	IDOC	
	Idaho Dept of Juvenile Corrections	IDJC	

2. **Search for an existing record by entering the first 3 letters of the last name followed by an *.** If the system does not return a match, click Create New Staff Member.

The screenshot shows the Idaho-WITS Training interface for the 'Staff Member Search' page. The top navigation bar includes the 'Idaho-WITS Training' logo, user information, and a 'Logout' button. The main content area has a search bar with the text 'Search...' and a 'Search' button. A red circle with the number '2' is placed over the search bar. To the right of the search bar is a button labeled 'Create New Staff Member', which is highlighted with a red box and a red arrow. Below the search bar is a table with columns for 'First Name', 'Last Name', 'Agency', 'Email', and 'Identifier'. The table contains several rows of staff member information, including 'Hattie Maltese', 'Number11 Clinician', 'Agency Admin16', 'Clinician 4 Ascent BH', 'Number 5 Clinician', and 'Dennis Williams'. A red circle with the number '2' is placed over the 'Create New Staff Member' button.

First Name	Last Name	Agency	Email	Identifier
Hattie	Maltese	D Williams Agency	hmaltese@inthcc.com	HMaltese1231
Number11	Clinician	D Williams Agency	hawkinsc@dhw.idaho.gov	clin11
Agency	Admin16	D Williams Agency	williamsd@dhw.idaho.gov	agencyadmin16
Clinician 4	Ascent BH	D Williams Agency	richascenbhs@hotmail.com	ABHclinician4
Number 5	Clinician	D Williams Agency	hawkinsc@dhw.idaho.gov	clin5
Dennis	Williams	D Williams Agency	williamsd@dhw.idaho.gov	willed

3. Complete: **First Name**, **Last Name** and **Gender**.

NOTE: Required fields are notated by a red line at the end of the data entry field.

4. Click **Create**.

Idaho-WITS Training

Create New Staff Member

Prefix:

First: Training

Preferred:

Middle:

Last: Provider

Suffix:

Gender: Male

Create Cancel

5. Click **Add Email Address** under the Completion Requirements.

Idaho-WITS Training

User: Linder, Carissa, WA | Location: D Williams Agency, Williams Treatment

Back to Search Staff Member Workspace DONE EDITING

Profile »

Profile

Provider, Training
Male
Date of Birth:

Completion Requirements

- + Add Email Address ?
- + Add Staff Member Type ?
- + Add Employment Start Date ?

Additional items

- > Define Employment Profile
- > Manage Accounts and Roles
- > Add Facility Assignment
- > Add Access Category
- > Add Professional Qualification
- > Add Email
- > Add Phone Number
- > Add Address
- > Add Identifier

6. Enter the **Staff Email Address**, click the **Primary checkbox**, and click **Save**.

The screenshot shows a 'Contact Information' form. The 'Preferred Method Of Contact' section contains an email address field with 'trainingprovider@provider.com', a 'Primary' checkbox which is checked, and 'Save' and 'Cancel' buttons. Red arrows point from a red circle with the number 6 to the email address field, the 'Primary' checkbox, and the 'Save' button.

7. Click **Add Staff Member Type** under the Completion Requirements.

The screenshot shows the 'Staff Member Workspace' for a user named Linder, Carissa, WA. The 'Profile' section shows 'Provider, Training Male' and 'Date of Birth:'. The 'Contact Information' section shows the email address 'trainingprovider@provider.com' and 'Primary' checkbox. The 'Completion Requirements' section has two buttons: '+ Add Staff Member Type' and '+ Add Employment Start Date'. Red arrows point from a red circle with the number 7 to the '+ Add Staff Member Type' button and the 'Primary' checkbox in the 'Contact Information' section.

8. Select the Staff Member Type.

9. Enter the Employment Date Range.

NOTE: When creating a new Staff Record, do not indicate the staff member has an Employment End Date.

10. Click Save.

This screenshot shows the 'Employment Profile' form. Red boxes and arrows with numbers indicate the following steps:

- 8:** A red box highlights the 'Staff Member Type' dropdown menu, which is set to 'Agency Clinical Staff'.
- 9:** A red box highlights the 'Employment Date Range' section, showing the date '02/02/2016' and an unchecked 'Has end date' checkbox.
- 10:** A red box highlights the 'Save' button at the bottom of the form.

The form includes fields for Job Title, Employment Type, Full Time Equivalent, Taxonomy Type, Taxonomy Classification, and Taxonomy Specialization. A sidebar on the right lists 'Additional items' such as 'Define Employment Profile', 'Manage Accounts and Roles', 'Add Facility Assignment', 'Add Access Category', 'Add Professional Qualification', 'Add Email', 'Add Phone Number', 'Add Address', 'Add Identifier', 'Add Language', 'Add Checklist Item', 'Add Relationship', 'Add Training', 'Add Note', and 'Add Domain'.

Creating the User ID

11. Click Manage Accounts and Roles from the Additional Items Menu.

This screenshot shows the user profile page for 'User: Linder, Carissa, WA' at 'Location: D Williams Agency, Williams Treatment'. The page has a 'MENU' on the left and a 'DONE EDITING' button at the top right. The main content area is divided into 'Profile' and 'Employment Profile' sections. A red box and arrow with the number 11 point to the 'Manage Accounts and Roles' option in the 'Additional items' sidebar. The 'Profile' section shows a user icon and the text 'Provider, Training Male' and 'Date of Birth:'. The 'Employment Profile' section shows 'Job Title:', 'Staff Member Type: Agency Clinical Staff', 'Employment Type:', and 'Employment Date Range: 02/01/2016 -'.

12. Enter the **Staff User Id** and click **Create Account**.


This screenshot shows the 'User Account' form in a software interface. A red circle with the number '12' has two arrows pointing to the 'User ID' input field and the 'Create Account' button. The 'User ID' field contains the text 'Provider'. Below the input field are two buttons: 'Create Account' and 'Cancel'. The form is part of a larger profile page with sections for 'User Account' and 'Contact Information'. The 'Contact Information' section shows an email address 'trainingprovider@provider.com' and a 'Primary' status. A sidebar on the right lists 'Additional items' with various options like 'Define Employment Profile', 'Manage Accounts and Roles', etc.

Adding Permissions

13. Click **Manage Roles** under the User Account.

This screenshot shows the 'User Account' form after the user has been created. The 'User ID' field now displays 'Provider'. A red circle with the number '13' has an arrow pointing to the 'Manage roles' button, which is located below the 'System Roles' and 'Agency Roles' sections. The 'Manage roles' button has a plus icon next to it. The form also shows the 'Contact Information' section with the same email address. The sidebar on the right is visible, showing the 'Additional items' list.

Note: Review the Assigning Staff Roles documentation on WITS.Idaho.gov under the WITS Forms tab before assigning roles for a staff member.

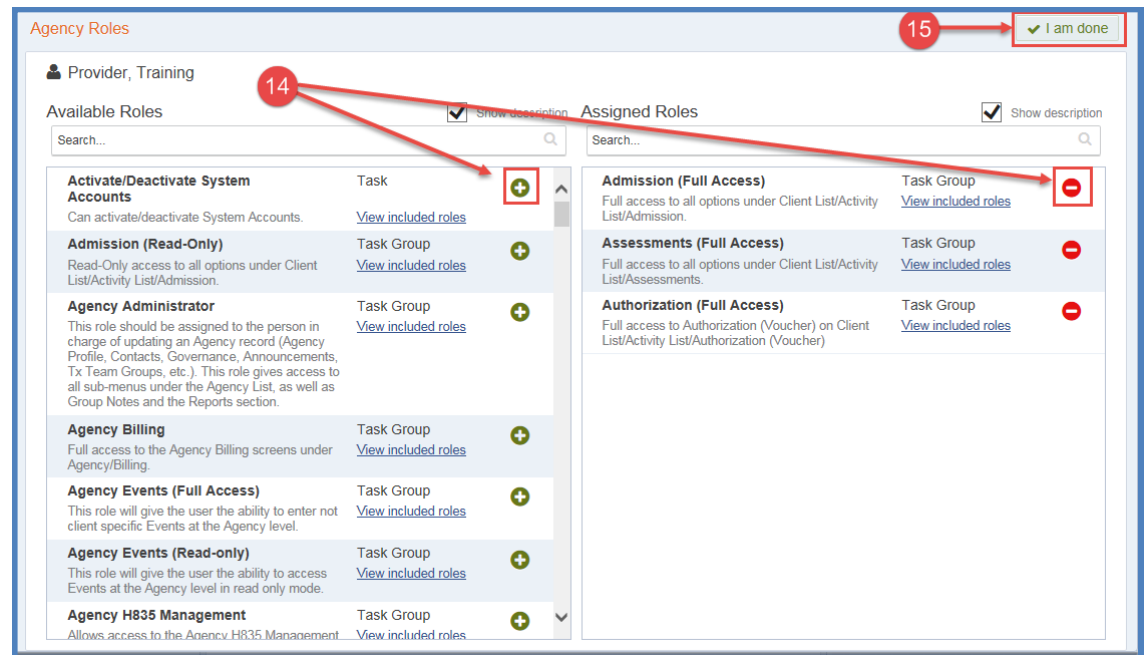
14. Click  **to Add a Permission** from the available roles to the assigned roles box

OR

click  **to Remove Permissions** from Assigned Roles.

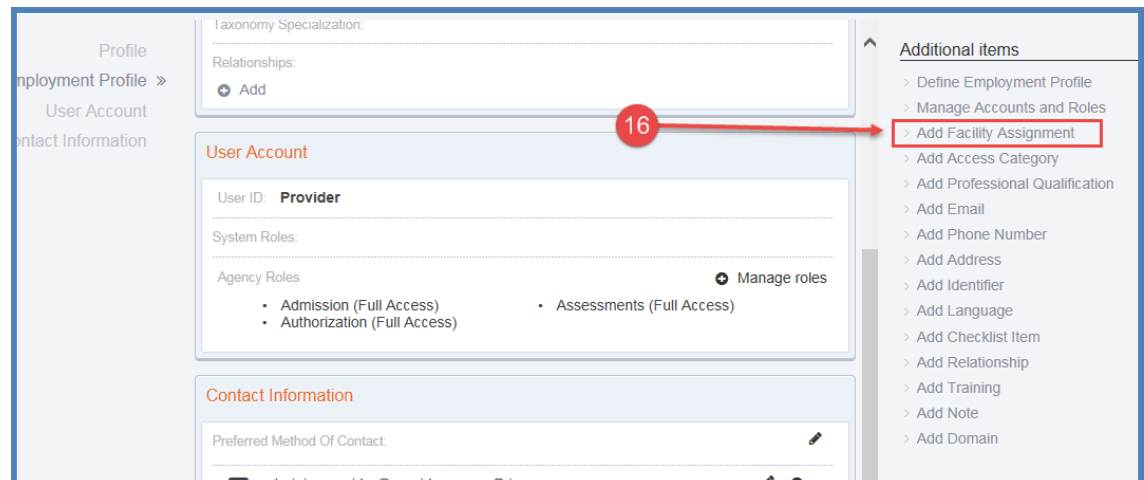
NOTE: Click View included roles to view all included

15. Click **I am Done** when all permissions have been added to Staff Profile.



Adding a Facility

16. Click **Add Facility Assignment** from the Additional items menu.



17. **Select the facilities** your staff need to access.
Clicking on them in the left-hand box will move them to the right-hand box, which denotes a selected facility.

18. Enter the **Effective Date**.

NOTE: When creating a new Staff Record, do not indicate the staff member has a End Date.

19. Click **Save**.

Facility Assignments

Facilities:

Williams Treatment

Alternative Treatment Location

Effective: 02/02/2016

Has end date

Save Cancel

Adding Professional Qualifications

20. Click **Add Professional Qualification**.

User Account

User ID: provider

System Roles: Admission (Full Access)

Agency Roles: Agency Billing

Manage roles

Facility Assignments

Alternative Treatment Location

02/01/2016

Additional items

Add Professional Qualification

21. Select the **Certification**.

22. Select the **Type** of Certification.

23. **Check the box** Include in Display Name.

24. Enter the **Effective Date**.

25. Click **Save**.

Category: Certification

Type: Advanced Certified Alcohol and Drug Counselor (ACADC)

Issuer Name:

Include in Display Name

Effective: 02/10/2016

Has end date

Save Cancel

Adding a Relationship

26. Click **Add Relationship** from the Additional Items Menu.

This screenshot shows the 'Additional items' menu on the right side of a software interface. The menu is expanded, showing a list of options. The option 'Add Relationship' is highlighted with a red box. A red arrow points from a red circle with the number 26 to this option. The main content area of the interface shows sections for 'Agency Roles', 'Professional Qualifications', and 'Contact Information'.

27. Select the **Relationship to the Staff Member** (role of the staff member) and select the name of the **Related Staff Member**.

This screenshot shows a form titled 'Relationship to this Staff Member:'. It has two dropdown menus. The first dropdown is labeled 'Relationship to this Staff Member:' and has 'Clinical Supervisor' selected. The second dropdown is labeled 'Related Staff Member:' and has 'Meyer, Carissa, ACADC' selected. Both dropdowns are highlighted with red boxes. A red arrow points from a red circle with the number 27 to the first dropdown. Below the dropdowns are 'Save' and 'Cancel' buttons. A red arrow points from a red circle with the number 28 to the 'Save' button.

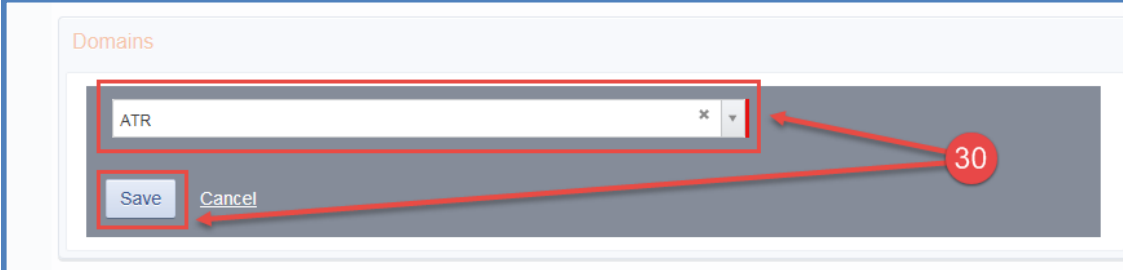
28. Click **Save**.

Adding a Domain

29. Click **Add Domain** from the Additional Items Menu.

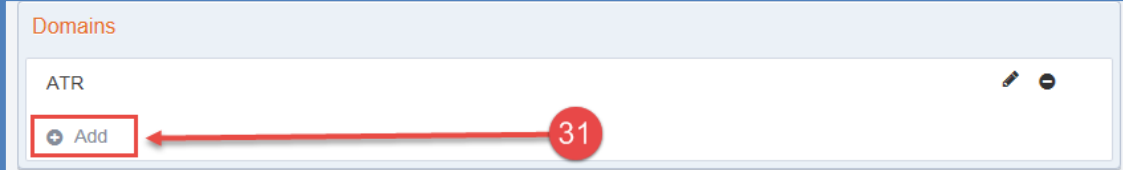
This screenshot shows the 'Additional items' menu on the right side of a software interface. The menu is expanded, showing a list of options. The option 'Add Domain' is highlighted with a red box. A red arrow points from a red circle with the number 29 to this option. The main content area of the interface shows sections for 'Agency Roles', 'Professional Qualifications', and 'Contact Information'.

30. Select **ATR** and click **Save**.



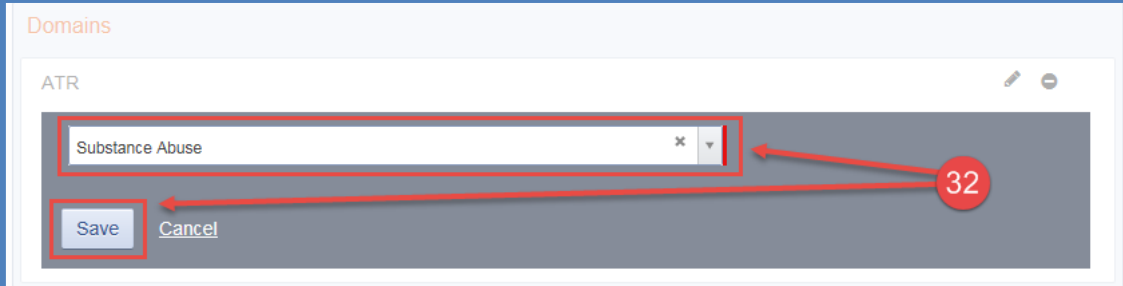
The screenshot shows a 'Domains' form with a text input field containing 'ATR'. Below the input field are 'Save' and 'Cancel' buttons. Red annotations include a box around the input field, a box around the 'Save' button, and a red circle with the number '30' with arrows pointing to both the input field and the 'Save' button.

31. Click **Add**.




The screenshot shows a 'Domains' list with one entry, 'ATR'. Below the list is a red-bordered button with a plus icon and the text 'Add'. A red circle with the number '31' has an arrow pointing to the 'Add' button.

32. Select **Substance Abuse** and click **Save**.



The screenshot shows a 'Domains' form with a text input field containing 'Substance Abuse'. Below the input field are 'Save' and 'Cancel' buttons. Red annotations include a box around the input field, a box around the 'Save' button, and a red circle with the number '32' with arrows pointing to both the input field and the 'Save' button.

33. Confirm the Domains of both ATR and Substance Abuse display.



The screenshot shows a 'Domains' list with two entries: 'ATR' and 'Substance Abuse'. Below the list is a red-bordered button with a plus icon and the text 'Add'. A red circle with the number '33' has an arrow pointing to the list of domains.

30. Click **Done Editing** at the top of the screen.

The screenshot displays the 'Idaho-WITS Training' interface. At the top, the header includes the WITS logo, the text 'Idaho-WITS Training', and a 'Logout' link. Below the header, a navigation bar shows 'User: Linder, Carissa, WA' and 'Location: D Williams Agency, Williams Treatment'. A 'MENU' button is on the left, and a 'Back to Search' link is in the center. On the right side of the navigation bar, a 'DONE EDITING' button is highlighted with a red rectangular box. A red arrow points from a red circle containing the number '30' to this button. The main content area is divided into two sections: 'Profile' and 'Employment Profile'. The 'Profile' section shows a user profile for 'Meyer, Squid, ACADC', 'Male', with a 'Date of Birth' field. The 'Employment Profile' section shows fields for 'Job Title', 'Staff Member Type' (Clinical Staff), 'Employment Type', and 'Employment Date Range' (02/10/2016 - 02/10/2016). Below these are fields for 'Full Time Equivalent', 'Taxonomy Type', 'Taxonomy Classification', and 'Taxonomy Specialization'. A 'Relationships' section shows a 'Relationship to this Staff Member' as 'Clinical Supervisor' and a 'Related Staff Member' as 'Meyer, Carissa, ACADC'. On the right side of the main content area, there is an 'Additional items' section with a list of actions: 'Define Employment Profile', 'Manage Accounts and Roles', 'Add Facility Assignment', 'Add Access Category', 'Add Professional Qualification', 'Add Email', 'Add Phone Number', 'Add Address', 'Add Identifier', 'Add Language', 'Add Checklist Item', 'Add Relationship', 'Add Training', 'Add Note', and 'Add Domain'.